

# PD2 LESSONS LEARNED



## MCRCO-MID WEST REGION

A few modest proposals for better enjoyment of the PD2 system.

# INSTALLATION PLANNING



- z Management must be familiar with the system software prior to planning.
- z System Administrator(s) should be familiar with the system software prior to taking systems administrator training.
- z Management overview course should be taken and a visit to an active site would also be helpful in developing a frame of reference.

# INSTALLATION PLANNING



- z PD2 provides several levels of security and the need for security must be balanced against production requirements. For example, who should be given permission to approve Purchase Requests, approve vendors?
- z Who will enter PR's into the system; how will workload assignments be made?

# INSTALLATION PLANNING



- z Determine the membership in teams and team cabinets and the total number of cabinets. We found that too many cabinets obscure the screen.
- z Are team cabinets really necessary?
- z Decide if a naming and filing convention is to be used to uniformly identify and locate objects.

# INSTALLATION PLANNING



- z Agency data sets should be scrutinized and local clause templates (matrices) should be created. Version 3.5 does a good job with clause templates.
- z Review contract forms to ensure all necessary data is supported. We entered the contract specialists name in the Contract Administration block in order for

# INSTALLATION PLANNING



- z (cont'd) the system to add it onto DD 1155's. Similarly, the vendor contact telephone number has to be added to the vendor address block. 3.5 does this automatically.
- z When installing an upgrade, check each workstation to ensure that it can create various items.

# INSTALLATION PLANNING



- z When installing an upgrade, be sure the existing database is backed up prior to loading new data.
- z The upgrade may rearrange other programs residing on the file server. FAR Master and Forms Flow were scrambled on our server after the upgrade to 3.5 was made.

# INSTALLATION PLANNING



- z We found that system training left a lot of gaps in some areas (modifications) and that some of our users had little motivation to learn the system.
- z Turn on the system as soon as possible after training is completed.
- z Use the Message of the day feature to highlight items that are unclear.



# INSTALLATION PLANNING



- z Free up your better users and System Administrators to help train your users having trouble during the training and after installation.
- z Conduct weekly, informal users meetings so that each user can share problems/lessons learned and workarounds. Identify items to be placed on issue tracker and given to the help desk.

# Break

